



POS ON CLOUD

User Manual

v1.06

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1. Installation

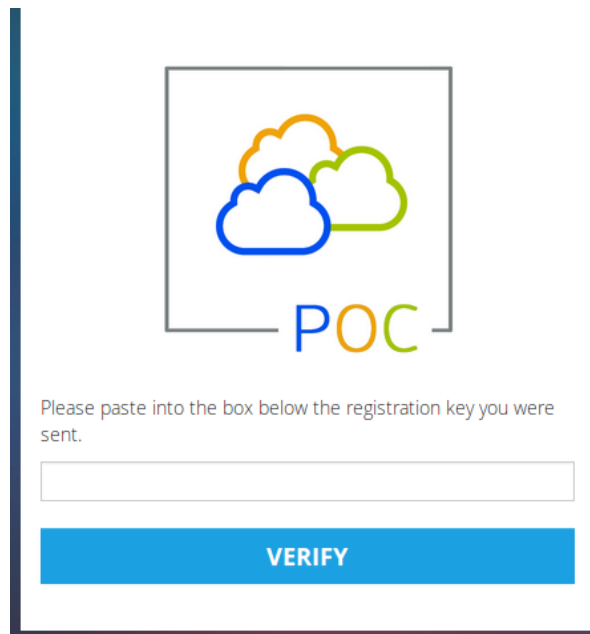
1.1.1 Installing POS on Cloud

Before continuing please make sure you have the following: your POS on Cloud registration key and your login PIN number. These should have been provided to you via e-mail. These installation steps are for both desktop computers and tablets.

1. Once you have your registration key and login PIN number navigate your browser to:

<https://food.posoncloud.com/config/register.php>

- NOTE: POS on Cloud only supports Google Chrome and Safari web browsers. Any other browser will NOT work.





Please paste into the box below the registration key you were sent.

VERIFY

2. You will now need to copy your register key EXACTLY how it appears in your e-mail into the blank field and click the **verify** button.

3. If no errors occur, then you will now see your logo on the screen and it will ask you for your PIN number. If an error does occur, then please double check you are typing in the correct registration key and try again.

4. Enter your PIN number into the field and then click **verify**.

5. You should now be taken to the Time Management page.
6. Congratulations, you have successfully installed POS on Cloud.

Frequently Asked Questions

Q: Will I have to do these installation steps for every update?

A: No, since POS on Cloud is cloud-based, you will never have to install updates. Simply refresh your browsers web page.

Q: Are there any times that I will have to reinstall POS on Cloud?

A: The only times you will have to reinstall POS on Cloud are; If you have to reinstall your OS, if you have to reinstall your web browser, or if you delete your web browser's cache. In order to do these reinstalls you must inform us first in order to reactivate you registration key.

2. Configuration

2.1 Configuring Your Store

The store configuration allows you to change a host of settings for your business. These settings include: Store Name, Address, City, State, Zip Code, Telephone, Business Type, Local Tax Rate, Business Tagline, and Payment Policy.

2.1.1 Editing your store configuration

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Store** button in the left-hand side of the screen.

Configuration

Store Information

This is information about your store	
Store Name	Caputo's Pizzeria
Address	123 Main Street
City	Chicago
State	Illinois
Zip Code	60652
Telephone	555-1234
Business Type	Full Service/Dine In
Local Tax Rate	7.0
Business Tagline	A slice of Long Island
Payment Policy	No cash refunds, house credit only

Save Form

3. In the store information page simply edit any setting you wish to change.

- When done editing, scroll to the bottom on the page and click the **Save Form** button.

2.2 Users

Users are the employees of your business. Each employee will have their own unique user profile and PIN number. This will be how your employees logs into the system.

2.2.1 Adding a User

- Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



- Once at the configuration page click the **Users** button in the left-hand side of the screen. This will take you to the list of Active User Profiles.

Active User profiles

These are active/inactive users attached to your profile. Click on the user name to view further details

[+ Add user](#)

User List					
Name	User Id	Last Login	Role	Status	YTD Sales
Kyle Petruska	kylep	2014-02-03 14:09:39	Tablet User	Active	\$6.41
Kyle Petruska	kylep3	2014-02-04 11:29:11	Admin/Super User	Active	\$25.64

- Click the **Add User** button. This should bring up the Create new user profile menu.

Create new user profile
×

User name

Password

Full Name of user

Nick name of user (e.g. SuzyQ)

5 Digit numeric PIN for POS access

Security Role of user

Kitchen ▼

☒ Save Settings

← →

4. Fill out the information as needed.

- NOTE: User name and PIN number must be unique. Password must be at least six (6) characters long.

5. When you have filled out all of the information click **Save Settings**. Your new user should appear in the list.

2.2.2 Editing a User

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Users** button in the left-hand side of the screen. This will take you to the list of Active User Profiles.

Active User profiles

These are active/inactive users attached to your profile. Click on the user name to view further details

[+ Add user](#)

User List					
Name	User Id	Last Login	Role	Status	YTD Sales
Kyle Petruska	kylep	2014-02-03 14:09:39	Tablet User	Active	\$6.41
Kyle Petruska	kylep3	2014-02-04 11:29:11	Admin/Super User	Active	\$25.64

3. Click the Name of the user you wish to edit. The Update Profile menu should appear.

Update Profile

User name

alliep

Password

Full Name of user

Allie P

Nick name of user (e.g. SuzyQ)

alliep

5 Digit numeric PIN for POS access

9802

Status of account

Active account

Security Role of user

Admin

4. Once you are done editing the user profile click **Save**.

5. The profile is now updated.

2.2.3 Deleting a User

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Users** button in the left-hand side of the screen. This will take you to the list of Active User Profiles.

Active User profiles

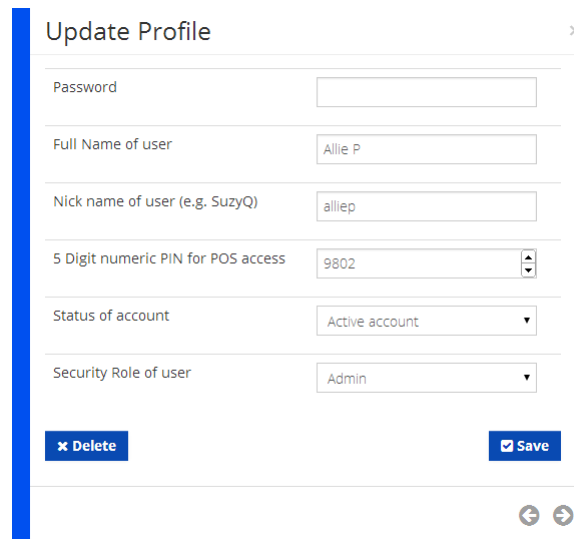
These are active/inactive users attached to your profile. Click on the user name to view further details

[+ Add user](#)

User List					
Name	User Id	Last Login	Role	Status	YTD Sales
Kyle Petruska	kylep	2014-02-03 14:09:39	Tablet User	Active	\$6.41
Kyle Petruska	kylep3	2014-02-04 11:29:11	Admin/Super User	Active	\$25.64

3. Click the Name of the user you wish to edit. The Update Profile menu should appear.

4. Scroll down to the bottom of the menu and click **Delete**.

A modal dialog box titled "Update Profile" with a close button (X) in the top right corner. The dialog contains several input fields and dropdown menus. The fields are: "Password" (empty), "Full Name of user" (containing "Allie P"), "Nick name of user (e.g. SuzyQ)" (containing "alliep"), "5 Digit numeric PIN for POS access" (containing "9802"), "Status of account" (dropdown menu showing "Active account"), and "Security Role of user" (dropdown menu showing "Admin"). At the bottom left is a blue button with a white X icon and the text "Delete". At the bottom right is a blue button with a white checkmark icon and the text "Save". Below the dialog box are two small circular arrows, one pointing left and one pointing right.

Password	
Full Name of user	Allie P
Nick name of user (e.g. SuzyQ)	alliep
5 Digit numeric PIN for POS access	9802
Status of account	Active account
Security Role of user	Admin

5. It will ask you to confirm the deletion. Click **Delete**. The user should be removed from the Active Profile list.

2.3 Settings

Settings allow you to enable/disable certain modules for your store. Depending on your service plan, you may incur additional charges by enabling these functions.

2.3.1 Enabling/Disabling a Setting

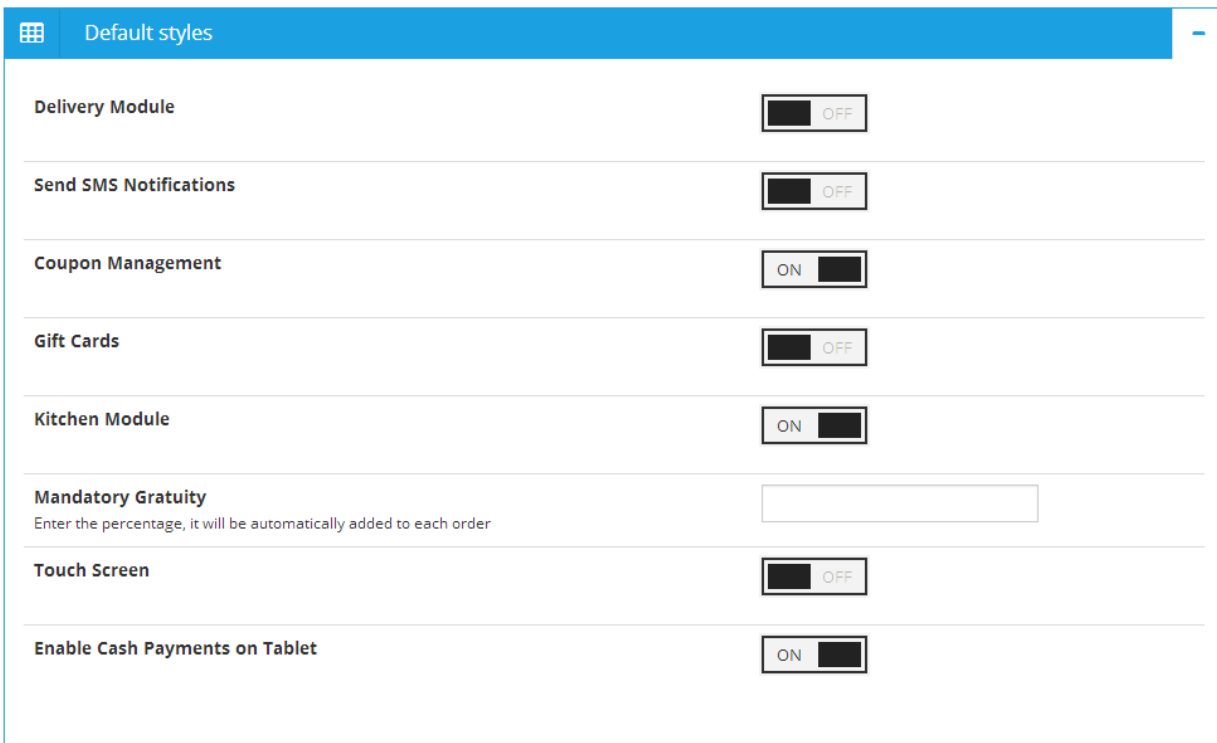
1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Settings** button in the left-hand side of the screen. This will take you to the Settings menu.

Settings

Please check/uncheck the appropriate modules you wish to enable/disable. Depending on your service plan you may incur additional charges by enabling these functions



The screenshot shows a settings interface with a blue header bar containing a grid icon and the text "Default styles". Below the header, there is a list of settings, each with a label and a toggle switch. The settings are:

- Delivery Module**: Toggle switch is OFF.
- Send SMS Notifications**: Toggle switch is OFF.
- Coupon Management**: Toggle switch is ON.
- Gift Cards**: Toggle switch is OFF.
- Kitchen Module**: Toggle switch is ON.
- Mandatory Gratuity**: A text input field with the placeholder text "Enter the percentage, it will be automatically added to each order".
- Touch Screen**: Toggle switch is OFF.
- Enable Cash Payments on Tablet**: Toggle switch is ON.

3. Find which setting you wish to enable/disable then click the **black square** in order to turn that feature on or off. This is saved automatically.

2.4 Printers

2.4.1 Adding a Printer

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Printers** button in the left-hand side of the screen. A drop down menu will appear below.

3. Click **Printer List**. A list of all configured printers will appear.

Printers

Configuring your system to print

[+ Add Printer](#)

Printer Listing	
Printer Name	IP Address/Server Path
Bar	\\POC\Citizen
Dessert Printer	\\POC\Citizen
Front	\\POC\Citizen
Kitchen	\\POC\Citizen
Lab Printer	CITIZEN CT-S310II
Miami Test Printer	\\SERVER002\zebra
Salad Printer	\\POC\Citizen

4. Click **Add Printer**. The Add New Printer menu will appear with two fields.

Add new printer

Printer Name

IP Address/Server Path

Required for Remote Printing

Save printer

←

→

5. In the field that says Printer Name you can name the printer anything to make it easily recognizable, such as “Kitchen.”

6. In the field that say IP Address/Server Path you give either the IP address of the printer on your network, the server path of your printer if it is shared on the network, or if it is a locally connected printer simply the exact name of the printer as it appears in your computer's printer list.

7. Once you are done, click **Save printer**. The new printer should now appear in the list.

- NOTE: The system does not make sure the printer you entered is connected. Please make sure you have correctly installed the printer before adding it to the list. To double check to see if the printer is installed click the printer name, then click **Test Printer**.

2.4.2 Editing a Printer

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Printers** button in the left-hand side of the screen. A drop down menu will appear below.

Printers

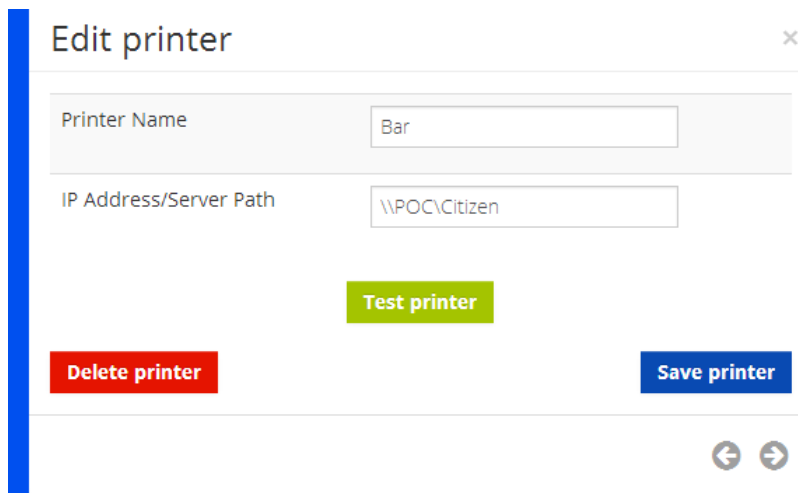
Configuring your system to print

[+ Add Printer](#)

Printer Listing	
Printer Name	IP Address/Server Path
Bar	\\POC\Citizen
Dessert Printer	\\POC\Citizen
Front	\\POC\Citizen
Kitchen	\\POC\Citizen
Lab Printer	CITIZEN CT-S310II
Miami Test Printer	\\SERVER002\zebra
Salad Printer	\\POC\Citizen

3. Click **Printer List**. A list of all configured printers will appear.

4. Click the Printer Name of the printer you wish to edit. The Edit printer menu should appear.



5. Edit the field needed then click **Save printer**.

2.4.3 Deleting a Printer

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Printers** button in the left-hand side of the screen. A drop down menu will appear below.

3. Click **Printer List**. A list of all configured printers will appear.

Printers

Configuring your system to print

[+ Add Printer](#)

Printer Listing	
Printer Name	IP Address/Server Path
Bar	\\POC\Citizen
Dessert Printer	\\POC\Citizen
Front	\\POC\Citizen
Kitchen	\\POC\Citizen
Lab Printer	CITIZEN CT-S310II
Miami Test Printer	\\SERVER002\zebra
Salad Printer	\\POC\Citizen

4. Click the Printer Name of the printer you wish to delete. The Edit printer menu should appear.

Edit printer

Printer Name

Bar

IP Address/Server Path

\\POC\Citizen

Test printer

Delete printer

Save printer

←

→

5. Click **Delete printer** in the bottom left corner. The printer is now deleted from the list.

2.5 Printer Mapping

This utility is used to map a specific category of product to a specific printer. If mapping is not set up properly then no receipts will print. Every category **MUST** have a printer mapped to it in order for product receipts from that category to print.

2.5.1 Adding a Printer Map

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Printers** button in the left-hand side of the screen. A drop down menu will appear below.

3. Click **Printer Mapping**. A list of all the current printer mapping will appear.

Printer Mapping

Use this utility to map a specific category to a printer

[+ Add Printer Mapping](#)

Printer Mapping Listing	
Category Name	Printer Name
Wine	Miami Test Printer
Calzones	Miami Test Printer
Beer	Miami Test Printer
Beverage	Miami Test Printer
Desserts	Lab Printer
Pasta	Miami Test Printer
Salad	Miami Test Printer
Sides	Miami Test Printer
Starters	Lab Printer
Pizza	Miami Test Printer

4. Click **Add Printer Mapping**. The Add new printer mapping menu should appear.

Add new printer mapping

Category

Catering

Printer

Bar

Save Mapping

5. Simply selection which category goes to which printer from the drop down menus.

6. Click **Save Mapping**. The new printer map is now added to the list.

2.5.2 Editing a Printer Map

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Printers** button in the left-hand side of the screen. A drop down menu will appear below.

3. Click **Printer Mapping**. A list of all the current printer mapping will appear.

Printer Mapping

Use this utility to map a specific category to a printer

[+ Add Printer Mapping](#)

Printer Mapping Listing	
Category Name	Printer Name
Wine	Miami Test Printer
Calzones	Miami Test Printer
Beer	Miami Test Printer
Beverage	Miami Test Printer
Desserts	Lab Printer
Pasta	Miami Test Printer
Salad	Miami Test Printer
Sides	Miami Test Printer
Starters	Lab Printer
Pizza	Miami Test Printer

4. Click the **Printer Name** alongside the Category you wish to edit. The Edit Mapping menu will appear.

Edit Mapping

Category

Wine

Printer

Miami Test Printer

Delete Mapping

Save Mapping

←

→

5. Change the settings then click **Save Mapping**.

2.5.3 Delete a Printer Map

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Printers** button in the left-hand side of the screen. A drop down menu will appear below.

3. Click **Printer Mapping**. A list of all the current printer mapping will appear.

Printer Mapping

Use this utility to map a specific category to a printer

[+ Add Printer Mapping](#)

Printer Mapping Listing	
Category Name	Printer Name
Wine	Miami Test Printer
Calzones	Miami Test Printer
Beer	Miami Test Printer
Beverage	Miami Test Printer
Desserts	Lab Printer
Pasta	Miami Test Printer
Salad	Miami Test Printer
Sides	Miami Test Printer
Starters	Lab Printer
Pizza	Miami Test Printer

4. Click the **Printer Name** alongside the Category you wish to delete. The Edit Mapping menu will appear.

Edit Mapping

Category

Wine

Printer

Miami Test Printer

Delete Mapping

Save Mapping

←

→

5. Click **Delete Mapping**. The mapping is now removed from the list.

2.6 Gateways

This is where you will enter your SureGate gateway credentials. We securely store this information encrypted in our system. If you do not know your SureGate information then please contact SureGate customer service.

2.6.1 Adding a Gateway

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Gateways** button in the left-hand side of the screen. A list of all your current Gateway information will appear.

Payment Gateway

Please enter your SureGate gateway credentials below. We securely store this information encrypted in our system. If you do not know this information please contact Suregate customer service.

[+ Add/Change Settings](#)

Default styles				
Gateway	Merchant Key	Date Activated	Activating IP	Remove
SureGate	KevAPI13	2014-01-15 14:15:42	74.142.12.190	×

3. Click **Add/Change Settings**. The Gateway Settings Menu will appear.

4. Select which Gateway you use from the drop down menu. Currently we only support SureGate. Once you have selected two new fields will appear.
5. The first field is your Merchant Key. Type in the key given to you by SureGate.
6. The second field is your Merchant Password. Type in the password given to you by SureGate.
7. Click **Save Settings**.

2.6.2 Editing a Gateway

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Gateways** button in the left-hand side of the screen. A list of all your current Gateway information will appear.

Payment Gateway

Please enter your SureGate gateway credentials below. We securely store this information encrypted in our system. If you do not know this information please contact Suregate customer service.

[+ Add/Change Settings](#)

Default styles				
Gateway	Merchant Key	Date Activated	Activating IP	Remove
SureGate	KevAPI13	2014-01-15 14:15:42	74.142.12.190	×

3. Click **Add/Change Settings**. The Gateway Settings Menu will appear.

4. Change the desired field(s).

5. Click **Save Settings**.

2.6.3 Deleting a Gateway

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Gateways** button in the left-hand side of the screen. A list of all your current Gateway information will appear.

Payment Gateway

Please enter your SureGate gateway credentials below. We securely store this information encrypted in our system. If you do not know this information please contact Suregate customer service.

[+ Add/Change Settings](#)

Default styles				
Gateway	Merchant Key	Date Activated	Activating IP	Remove
SureGate	KevAPI13	2014-01-15 14:15:42	74.142.12.190	X

3. Find the row with Gateway you wish to delete. Go to the Remove column of the list. Click the blue **X**.

2.7 Register Keys

This is where all of your POS on Cloud Register keys appear. In the event payment has been declined you register key will become deactivated and you will not be able to access the order pad.

2.7.1 Adding a Register Key

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Register Key** button in the left-hand side of the screen. A list of all your current register keys will appear.

Register Keys

All of your POSOnCloud Register keys appear here. In the event payment has been declined your register key will become deactivated and you will not be able to access the order pad.

[+ Upload New Key](#)

Purchased Licenses			
Key Id	Status	Expires	Activating IP
A	Activated	2015-02-28	

3. Click **Upload New Key**. The Upload Key menu will appear.

X — O
uploadKey.php

Please locate the file you downloaded from the PosOnCloud website on your computer. Once you select the file, choose the activate button and we will activate the Key and link it to this terminal

No file chosen

[Upload Key](#)

4. Click **Choose File** and navigate to the key file.
5. Once the file is selected click **Upload Key**.

2.8 Floor Plan/Layout

Layout Wizard

The layout wizard allows you to create, edit, and delete layouts for your business. This comes in the form of an easy drag-and-drop fashion.

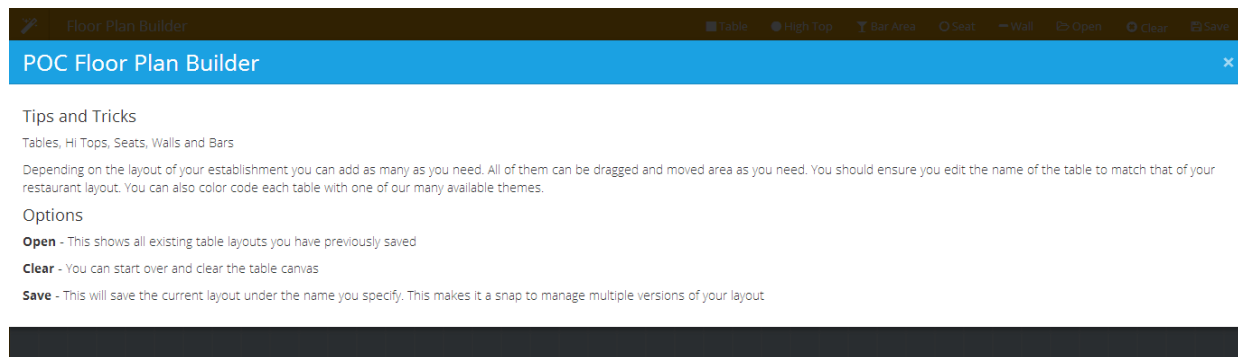
2.8.1 Creating a Layout

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Floor Plan/Layout** button in the left-hand side of the screen. A drop down menu will appear below.

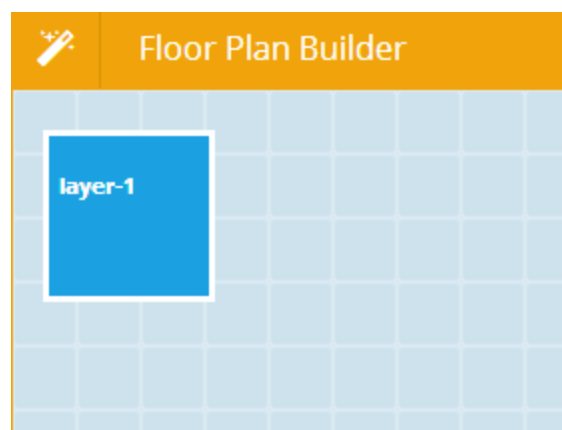
3. Click **Layout Wizard**. This will take you to the Floor Plan Builder.



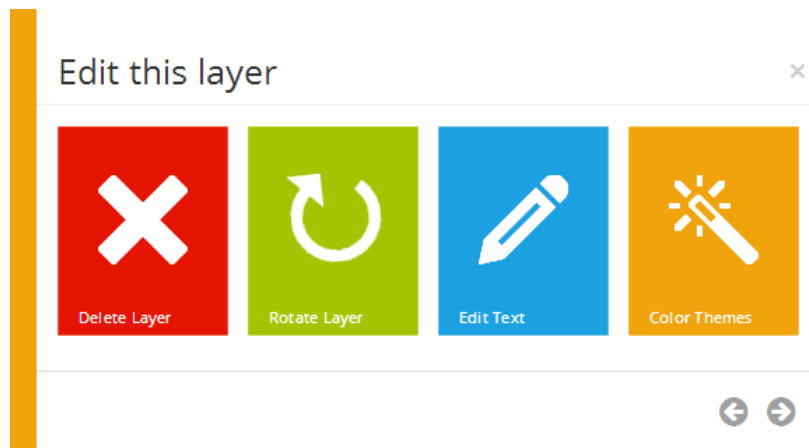
4. Simply click on the appropriate button to add either a Table, High Top, Bar Area, or Seat. It will be added to the top left of the floor plan with the name layer-#.



5. Drag the tile to the desired spot on the floorplan.

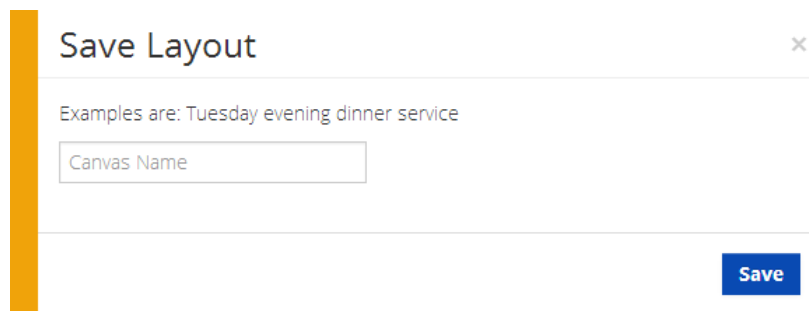


6. You may then double click the tile to customize it further with the Edit this layer menu.



7. Repeat steps 4 through 6 as desired.

8. Before leaving the builder remember to save the layout. Click **Save**. The Save Layout menu will appear.



9. Put a name in the field that you wish your layout to have, as an example “Tuesday night dinner service”.

10. Click **Save**. Your layout is now saved.

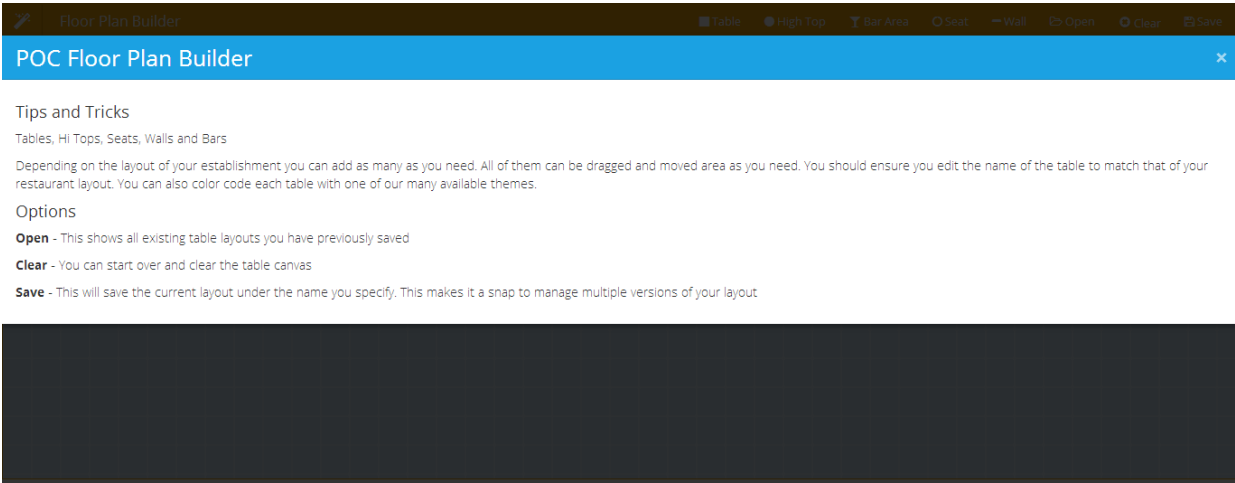
2.8.2 Deleting a Layout

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Floor Plan/Layout** button in the left-hand side of the screen. A drop down menu will appear below.

3. Click **Layout Wizard**. This will take you to the Floor Plan Builder.



4.

Click **Open** on the toolbar. The Save Layouts menu will appear with a list of all your current saved layouts.

Saved Layouts

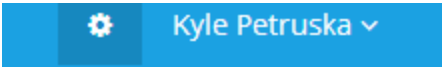
Layout Name	Created On	Actions
sample1	2014-02-03	 
Wedding	2014-01-30	 
test1	2014-01-17	 
Sample	2014-01-17	 
Back Bar	2014-01-16	 
Front	2014-01-07	 
Bar	2014-01-06	 

5. Find the layout you wish to delete. In the Actions column, click the **Trash Can** icon. Layout is now deleted.

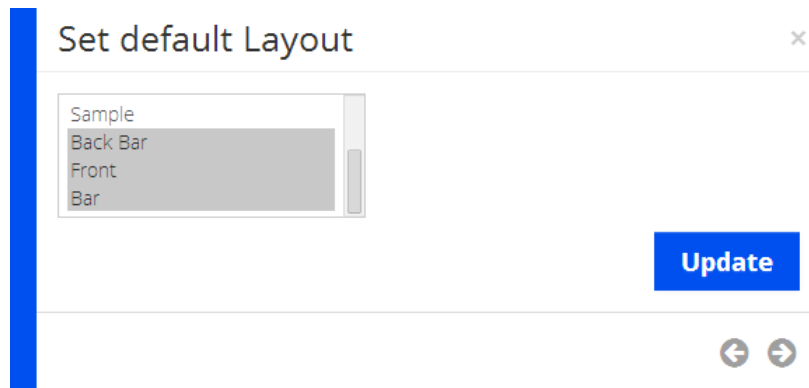
2.8.3 Setting Your Active Layout

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Floor Plan/Layout** button in the left-hand side of the screen. A drop down menu will appear below.

3. Click **Set Active Layout**. The Set default Layout menu will appear.



4. Simply click the layout you wish to be set as active.
 - NOTE: Multiple layouts can be selected at a time. Hold down your CTRL key and then click all the layouts you want to be active.
5. Click **Update**.

3. Products

3.1 Your Products

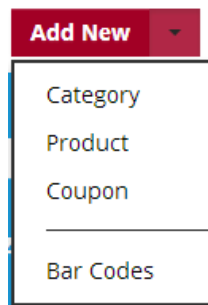
Adding, editing, customizing, and deleting your products has never been so easy. POS on Cloud makes this easy with our product management system.

3.1.1 Adding A New Product Category

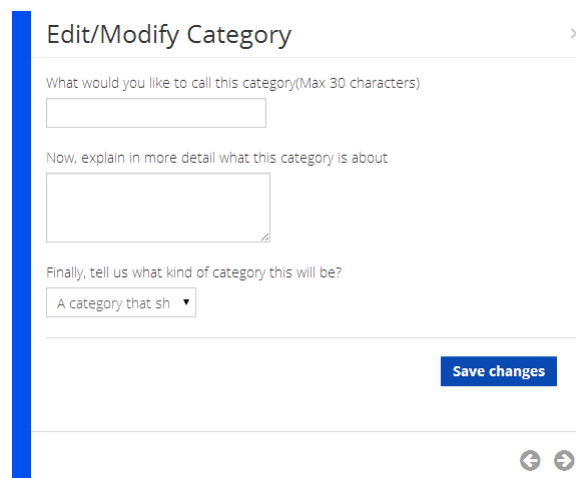
1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



2. Click the **black downward arrow** next to Add New. A dropdown menu will appear.



3. Click **Category**. The Edit/Modify Category menu will appear with three (3) fields.

A form titled 'Edit/Modify Category' with a close button (X) in the top right corner. The form contains three fields: 1. A text input field with the placeholder text 'What would you like to call this category(Max 30 characters)'. 2. A text area with the placeholder text 'Now, explain in more detail what this category is about'. 3. A dropdown menu with the placeholder text 'Finally, tell us what kind of category this will be?' and a selected option 'A category that sh'. At the bottom right of the form is a blue button labeled 'Save changes'. At the bottom center of the form are two circular arrows, one pointing left and one pointing right.

4. The first field is the name of your category. This only supports up to thirty (30) characters.

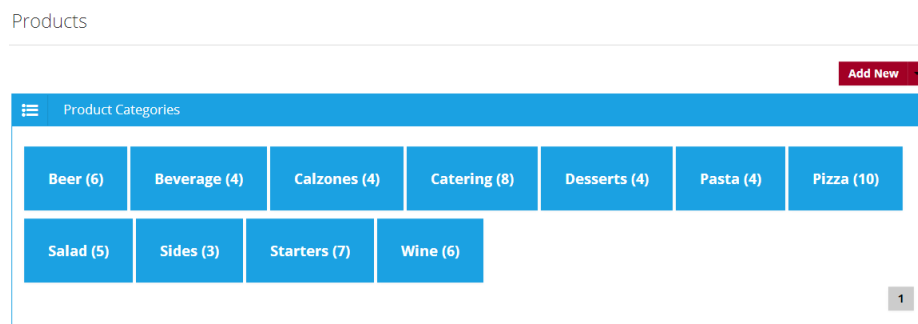
5. The second field is the description of your category.
6. The third is the type of category. “**A category that shows products I wish to sell**” must be selected to create a new category.
7. Click **Save Changes**.
 - NOTE: Giving a category a custom color theme can be found in Editing A Product Category.

3.1.2 Editing A Product Category

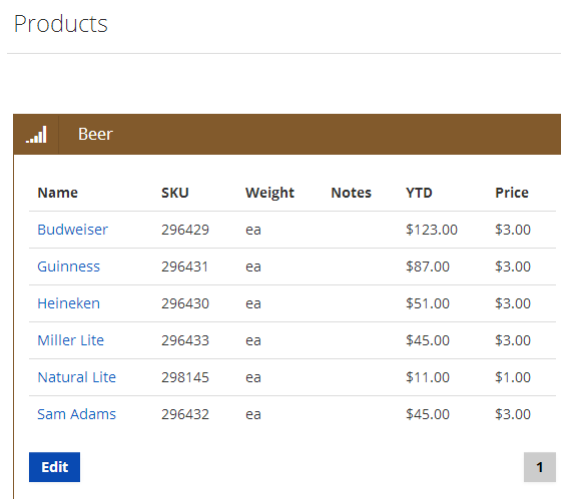
1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



2. Click the category you wish to edit.



3. Click **Edit** at the bottom. The Modify Category menu will appear.



4. Edit the category to your needs. You can even change the color theme from this menu.

5. Click **Save changes**.

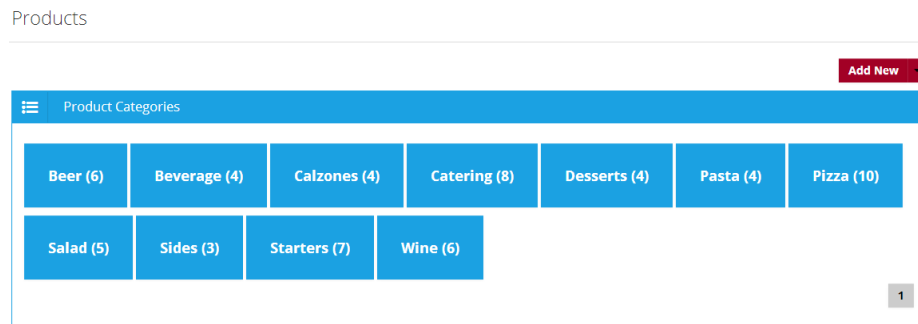
3.1.3 Deleting A Product Category

- NOTE: In order to delete a category there must be no products in that category. Please reference Deleting A Product or Modifying A Product.

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



2. Click the category you wish to deleted.



3. Click **delete category**.

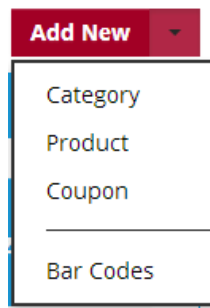
4. A confirmation will appear asking if you want to delete the category. Click **OK**.

3.1.4 Adding A New Product

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



2. Click the **black downward arrow** next to Add New. A dropdown menu will appear.



3. Click **Product**. The Add New Product menu will appear.

A screenshot of a web form titled 'Add new product' with a close button (X) in the top right corner. The form contains five input fields: 'Product Name (Max 30 characters)', 'Product Description (Max 100 characters)', 'Price (Format: 0.00)', 'Cost (Format: 0.00)', and a 'Category' dropdown menu. The dropdown menu is open, showing 'Category => Beer'. A blue 'Save Product' button is located at the bottom right of the form. Below the form, there are two small circular navigation buttons, one with a left arrow and one with a right arrow.

4. The first field is the name of the product you are selling. This supports up to thirty (30) characters.
5. The second field is the description of the product you are selling.
6. The third field is how much you are charging for that product.
7. The fourth field is how much the item cost you.
8. The sixth field is the category this product goes into. Simply use the dropdown menu to select one of your already created categories.
9. Click **Save Changes**.

3.1.5 Editing A Product

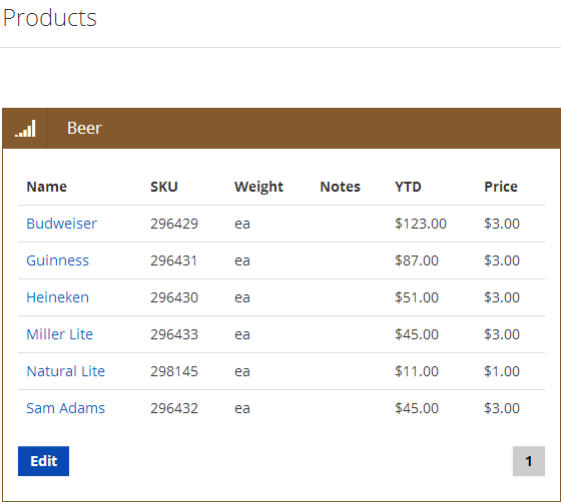
1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



2. Click the category the product is in. A list of all the items in this category will appear.



3. Click the product you wish to edit. The product and all of its fields will appear to the right of the list.



4. Click the **Pen and Paper** icon next to the field you wish to change.

Budweiser/296429		
Description:	Budweiser	
Mfg Sku:	BUD001009	
Notes:	Notes	
Category:	Beer	
Modifiers (+)		
Modifiers (-)		
Allergens:		
Menu Desc:	Budweiser Beer	
Measure:	ea	
Taxable:	y	
Status:	active	
Unit Price:	\$3.00	
Unit Cost:	\$2.50	
Min Stock:	10	

5. Edit the field. These fields range from Product name, Category, Modifiers, Allergens, Description, Taxable, Status, Price, Cost, Tax Rate, and more.

6. When done simply click out of the field you edited. Changes are saved automatically.

7. Repeat steps 4 through 6 as needed.

3.1.6 Deleting A Product

- NOTE: Only items with NO sales are able to be deleted. If you wish to set a product to no longer appear in the order pad please refer to Setting A Product Inactive.

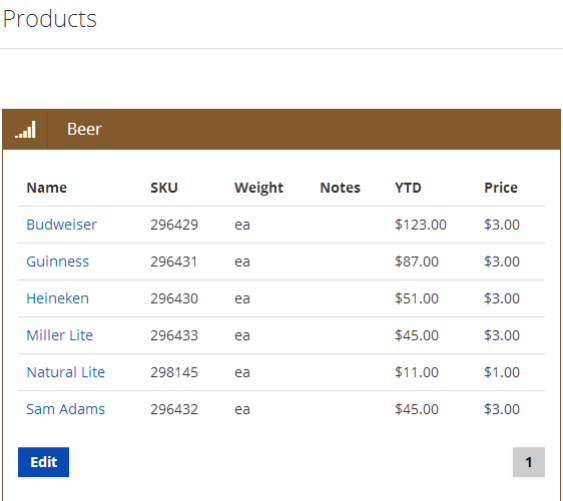
1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



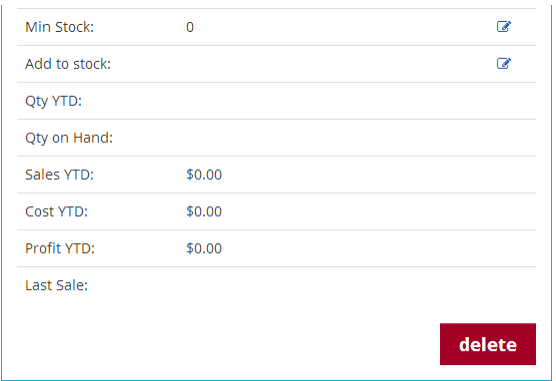
2. Click the category the product is in. A list of all the items in this category will appear.



3. Click the product you wish to delete. The product and all of its fields will appear to the right of the list.



4. Click **delete** in the bottom left corner.



5. A confirmation will appear asking if you really wish to delete this product. Click **OK**.

3.1.7 Editing Product Allergens

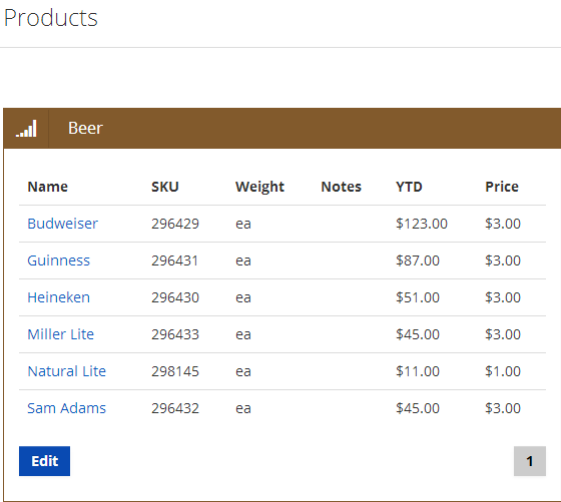
1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



2. Click the category the product is in. A list of all the items in this category will appear.



3. Click the product you wish to edit the allergens of. The product and all of its fields will appear to the right of the list.



4. Click the **Pen and Paper** icon next to the Allergens field.

Budweiser/296429		
Description:	Budweiser	✎
Mfg Sku:	BUD001009	✎
Notes:	Notes	
Category:	Beer	✎
Modifiers (+)		✎
Modifiers (-)		✎
Allergens:		✎
Menu Desc:	Budweiser Beer	✎
Measure:	ea	✎
Taxable:	y	✎
Status:	active	✎

5. Check all the boxes of the each allergen in the product.

6. Click **Save Settings**.

3.1.8 Editing Product Modifiers

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



2. Click the category the product is in. A list of all the items in this category will appear.



3. Click the product you wish to edit the modifiers of. The product and all of its fields will appear to the right of the list.

Products

Beer					
Name	SKU	Weight	Notes	YTD	Price
Budweiser	296429	ea		\$123.00	\$3.00
Guinness	296431	ea		\$87.00	\$3.00
Heineken	296430	ea		\$51.00	\$3.00
Miller Lite	296433	ea		\$45.00	\$3.00
Natural Lite	298145	ea		\$11.00	\$1.00
Sam Adams	296432	ea		\$45.00	\$3.00
Edit					1

- Click the **Pen and Paper** icon next to the Modifiers (+) or Modifiers (-) field.

Budweiser/296429		
Description:	Budweiser	
Mfg Sku:	BUD001009	
Notes:	Notes	
Category:	Beer	
Modifiers (+)		
Modifiers (-)		
Allergens:		
Menu Desc:	Budweiser Beer	
Menu Desc:		

- Check all the boxes of the each modifier for the product.
- Click **Save Settings**.

3.1.9 Adding/Editing Product Notes

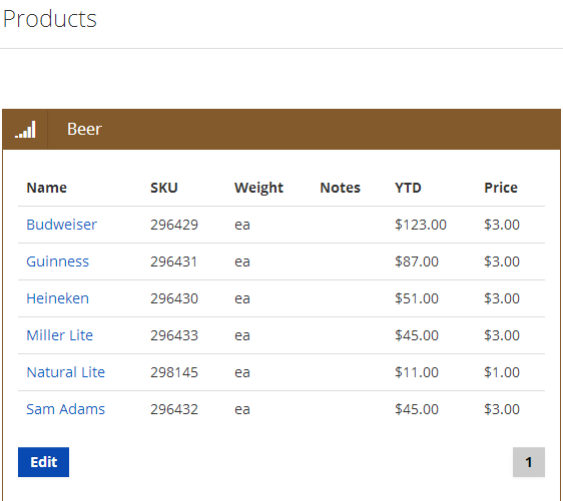
- Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



- Click the category the product is in. A list of all the items in this category will appear.



3. Click the product you wish to edit the notes of. The product and all of its fields will appear to the right of the list.



4. Click the **Notes** button.

Budweiser/296429		
Description:	Budweiser	
Mfg Sku:	BUD001009	
Notes:	Notes	
Category:	Beer	
Modifiers (+)		
Modifiers (-)		
Allergens:		
Menu Desc:	Budweiser Beer	
Measure:	ea	
Taxable:	y	
Status:	active	
Unit Price:	\$3.00	
Unit Cost:	\$2.50	
Min Stock:	10	

5. Click **Add note** to add a new line, or click **an existing line** to edit it. Repeat as needed.
6. Click **Save notes**.

3.1.10 Adding/Editing A Product SKU

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.
2. Click the category the product is in. A list of all the items in this category will appear.
3. Click the product you wish to add a SKU to. The product and all of its fields will appear to the right of the list.
4. Click the **Pen and Paper** icon next to the Mfg Sku field.
5. Enter whatever you wish the SKU to be.
6. Once you are done entering the SKU, click out of the form. Changes will be saved automatically.

Changing If a Product is Taxable.

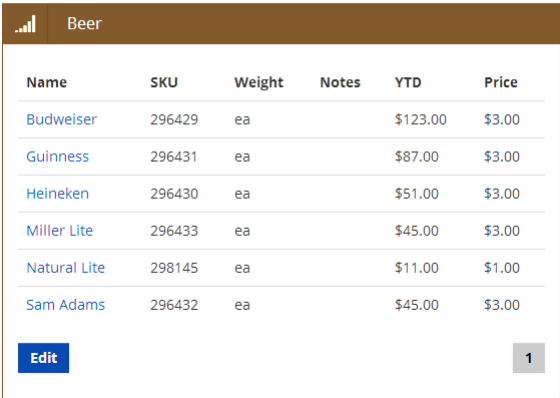
1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



2. Click the category the product is in. A list of all the items in this category will appear.



3. Click the product you wish to add set taxable or not. The product and all of its fields will appear to the right of the list.



4. Click the **Pen and Paper** icon next to the Taxable field.

Budweiser/296429		
Description:	Budweiser	
Mfg Sku:	BUD001009	
Notes:	Notes	
Category:	Beer	
Modifiers (+)		
Modifiers (-)		
Allergens:		
Menu Desc:	Budweiser Beer	
Measure:	ea	
Taxable:	y	
Status:	active	
Unit Price:	\$3.00	
Unit Cost:	\$2.50	
Min Stock:	10	

5. Click either **Taxable** OR **Non-taxable**. Changes will be saved automatically.

3.2 Modifiers

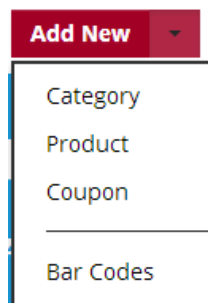
Modifiers are ways customers can customize your products. These are split into two categories: Modifiers (+) and Modifiers (-). You can have an unlimited number of modifiers and each product can have its own different modifiers. You can even set a price for each modifier.

3.2.1 Adding A New Modifier Category

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



2. Click the **black downward arrow** next to Add New. A dropdown menu will appear.



3. Click **Category**. The Edit/Modify Category menu will appear with three (3) fields.

4. The first field is the name of your Modifier Category, for instance “Add Bacon” or “Pizza Modifiers”. This only supports up to thirty (30) characters.

5. The second field is the description of your Modifier.

6. The third is the type of category. If you are making a Modifier (+), then choose “**A category that shows upsell items or additional items**”. If you are making a Modifier (-), then choose “**A category that shows exclusions for a product**”.

7. Click **Save Changes**.

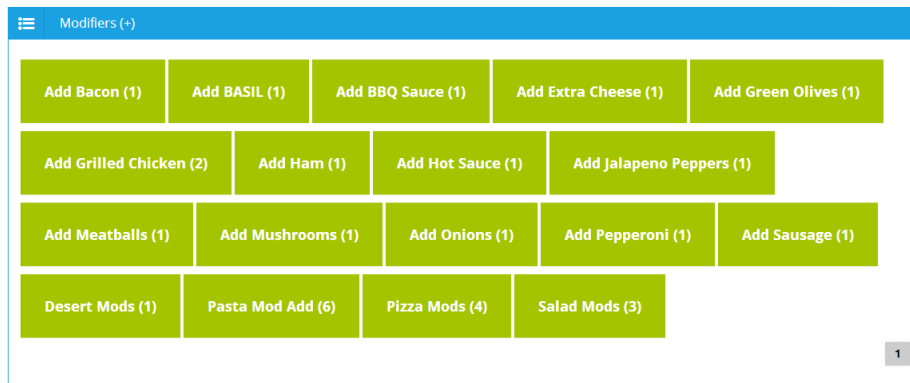
3.2.2 Editing A Modifiers Category

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



2. Click **Modifiers (+)** or **Modifiers (-)**, depending on your needs.

3. Click the modifier category you wish to edit.



4. Click **Edit** at the bottom. The Modify Category menu will appear.

Add Bacon					
Name	SKU	Weight	Notes	YTD	Price
Add Bacon	296611	ea		\$40.00	\$1.00
Edit 1					

5. Edit the modifier category to your needs.

6. Click **Save changes**.

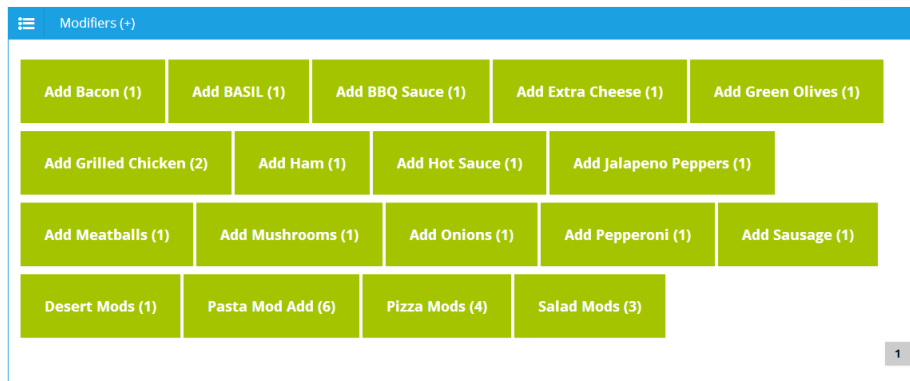
3.2.3 Deleting A Modifiers Category

- NOTE: In order to delete a modifiers category there must be no products in that category. Please reference Deleting A Modifier or Editing A Modifier.

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



2. Click **Modifiers (+)** or **Modifiers (-)**, depending on your needs.



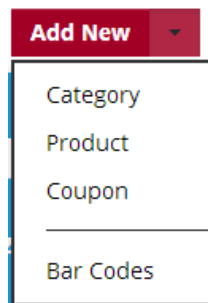
3. Click the modifiers category you wish to deleted.
4. Click **delete category**.

3.2.4 Adding A New Modifier

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



2. Click the **black downward arrow** next to Add New. A dropdown menu will appear.



3. Click **Product**. The Add New Product menu will appear.

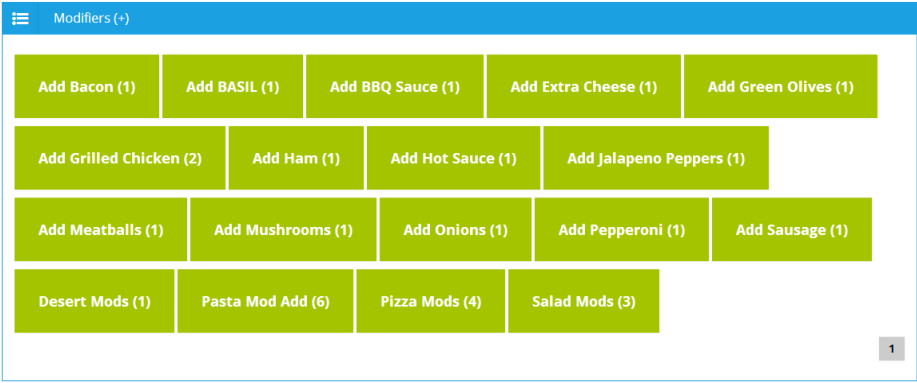
4. The first field is the name of the modifier, such as “Add Bacon” or “Add Grilled Chicken”. This supports up to thirty (30) characters.
5. The second field is the description of the modifier.
6. The third field is how much you are charging for the modifier. This can be set to “0.00”. We strongly suggest all Modifiers (-) be set to “0.00”.
7. The fourth is the cost of the item. This can be left blank if needed.
8. The sixth field is the category this modifier goes into. Simply use the dropdown menu to select one of your already created modifier categories. Look for “Modifiers (+) =>” for Modifiers (+) and “Modifiers (-) =>” for Modifiers (-).
9. Click **Save Changes**.

3.2.5 Editing A Modifier

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



2. Click **Modifiers (+)** or **Modifiers (-)**, depending on your needs.



3. Click the modifier category the product is in. A list of all the modifiers in this category will appear.

Add Bacon					
Name	SKU	Weight	Notes	YTD	Price
Add Bacon	296611	ea		\$40.00	\$1.00
Edit					

4. Click the modifier you wish to edit. The modifier and all of its fields will appear to the right of the list.

Description:	Add Bacon	
Mfg Sku:		
Notes:	Notes	
Category:	Add Bacon	
Modifiers (+)		
Modifiers (-)		
Allergens:		
Menu Desc:	Bacon	
Measure:	ea	
Taxable:	y	
Status:	active	
Unit Price:	\$1.00	
Unit Cost:	\$0.00	
Min Stock:	0	
Add to stock:		
Qty YTD:	40	
Qty on Hand:	-15	

5. Click the **Pen and Paper** icon next to the field you wish to change.

6. Edit the field.

7. When done, simply click out of the field you edited. Changes are saved automatically.

8. Repeat steps 5 through 7 as needed.

3.2.6 Deleting A Modifier

- NOTE: Only modifiers with ZERO sales are able to be deleted. If you wish to set a modifier to no longer appear in the order pad please refer to Setting A Modifier Inactive.

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



2. Click **Modifiers (+)** or **Modifiers (-)**, depending on your needs.



3. Click the modifier category the product is in. A list of all the modifiers in this category will appear.

Add Bacon					
Name	SKU	Weight	Notes	YTD	Price
Add Bacon	296611	ea		\$40.00	\$1.00
Edit					

4. Click the modifier you wish to delete. The modifier and all of its fields will appear to the right of the list.

Add to stock:	
Qty YTD:	
Qty on Hand:	
Sales YTD:	\$0.00
Cost YTD:	\$0.00
Profit YTD:	\$0.00
Last Sale:	

delete

5. Click **delete** in the bottom left corner.

6. A confirmation will appear asking if you really wish to delete this modifier. Click **OK**.

3.3 Coupons

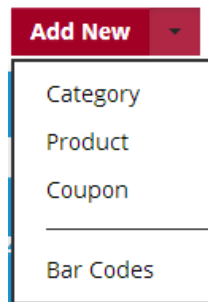
Coupons can be set to automatically discount customers for buy a certain number of a certain product during a specific time frame.

3.3.1 Adding A New Coupon

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



2. Click the **black downward arrow** next to Add New. A dropdown menu will appear.



3. Click **Coupon**. The Add new coupon menu will appear.

TODO

4. The first field is a coupon code for the new coupon. This has a ten (10) character limit.

5. The second field is the description of the coupon. This has a thirty (30) character limit.

6. The third field is how many units of the product must be purchased before the coupon is applied.

7. The fourth field is how much the discount takes off (ex: 1.00).
8. The fifth and sixth fields specify which dates the coupon runs through. If left blank, the default time is set to one (1) month.
9. For the seventh field use the dropdown menu to select which product or modifier this coupon applies to.
10. Click **Save changes**.

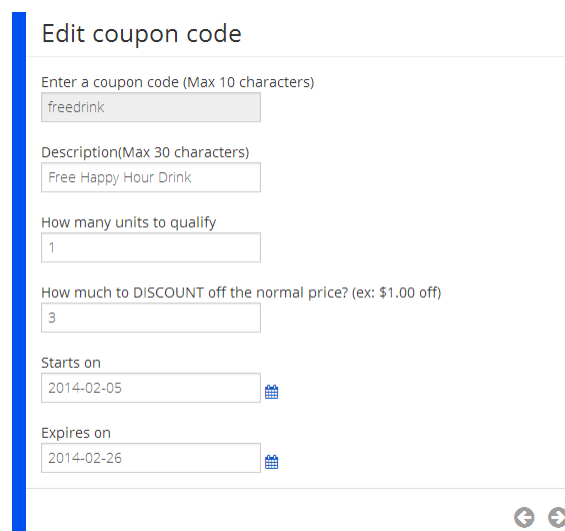
3.3.2 Editing A Coupon

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.

2.  Click **Coupons**. The Coupon Codes menu will appear.



3. Click the coupon you wish to edit. The edit coupon code menu will appear.



4. Edit the fields as needed.
5. Click **Save changes**.

3.3.3 Deleting A Coupon

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.

2.  Click **Coupons**.

3. Click the coupon you wish to delete. The edit coupon code menu will appear.

4. Click **delete**.

3.4 Bar Codes

With POS on Cloud you can create and print your own bar codes through our system. It is simple and easy to do with no hassle at all.

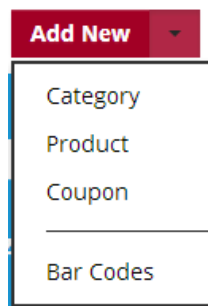
3.4.1 Printing Bar Codes for Products

- NOTE: Only products with a SKU will appear in the Print bar code menu. Please refer to **Adding/Editing A Product SKU** for details on this.

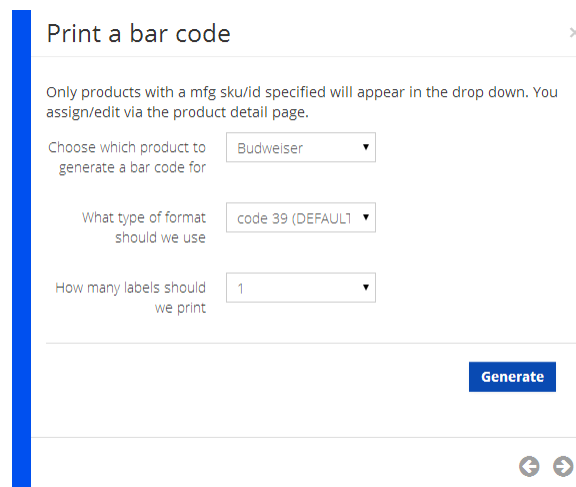
1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.



2. Click the **black downward arrow** next to Add New. A dropdown menu will appear.



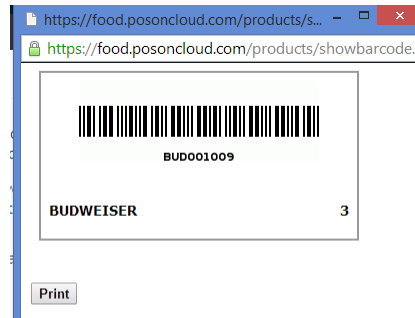
3. Click **Bar Code**. The Print bar code menu will appear.



4. The first field is which product bar code you wish to print. Select one via the dropdown menu.

5. The second field is the bar code format. Select one via the dropdown menu. The default is code 39.

6. The third field is how many labels you want to print.
7. Click **Generate**. A new window should appear with the bar codes.



8. Scroll to the bottom of the window. Click **Print**.
9. Make sure all your printer settings are correct. Click **Print**.

4. Customers

4.1.1 Adding A New Customer

1. Click **Customers** tab. A list of your current customers will appear.

Customers

ExportAdd user

List

Name	Email	Address	City/State/Zipcode	Joined	YTD Sales
EMAIL USER	kevin@4eyes.me		..	2014-02-11	\$0.00
Gavi Free	gfree@ah.com	1235 Fake Street	Austin, TX, 12345	2014-01-07	\$72.70
Goeff Rams	grams@ah.com	7382 Fake Road	Rooster, TN, 93201	2014-01-07	\$45.71
Jack Patto	jpatto@ah.com	49403 Flight Road	Snow City, MI, 39302	2014-01-07	\$52.39
John Smith	j.smith@email.com	1345 Rolling Hill Road	St. Patrick, MT, 39485	2014-02-04	\$0.00
Michael Jone	mjone@Ah.com	1234 Fake Street	Austin, TX, 12345	2014-01-07	\$67.63
Ray Narz Jr.	rmarz@ah.com	4321 Fake Road	Fake Town, FL, 42312	2014-01-07	\$102.54
Ryan Hlwood	rhiwood@ah.com	123 Fake Street	Small Town, AL, 32425	2014-01-07	\$56.11

2. Click **Add user**. The Add New User menu will appear.

Add New User

Full Name

Address

City

StateAlabama

Postal Code

E-mail

Phone

3. Fill out fields as needed. The notes and phone fields are optional.

4. Click **Save Settings**.

4.1.2 Editing A Customer

- 1. Click **Customers** tab. A list of your current customers will appear.

Customers

Export

+ Add user

List					
Name	Email	Address	City/State/Zipcode	Joined	YTD Sales
EMAIL USER	kevin@4eyes.me			2014-02-11	\$0.00
Gavi Free	gfree@ah.com	1235 Fake Street	Austin, TX, 12345	2014-01-07	\$72.70
Goeff Rams	grams@ah.com	7382 Fake Road	Rooster, TN, 93201	2014-01-07	\$45.71
Jack Patto	jpatto@ah.com	49403 Flight Road	Snow City, MI, 39302	2014-01-07	\$52.39
John Smith	j.smith@email.com	1345 Rolling Hill Road	St. Patrick, MT, 39485	2014-02-04	\$0.00
Michael Jone	mjone@Ah.com	1234 Fake Street	Austin, TX, 12345	2014-01-07	\$67.63
Ray Narz Jr.	rnarz@ah.com	4321 Fake Road	Fake Town, FL, 42312	2014-01-07	\$102.54
Ryan Hiwood	rhiwood@ah.com	123 Fake Street	Small Town, AL, 32425	2014-01-07	\$56.11

- 2. Click the **Name** of the customer you wish to edit. The Edit User menu will appear.

Edit User

Full Name of user

Gavi Free

Address

1235 Fake Street

City

Austin

State

Texas

Postal Code

12345

E-mail

gfree@ah.com

Phone

- 3. Edit the fields as needed. The notes and phone fields are optional.
- 4. Click **Save Settings**.

4.1.3 Deleting A Customer

- 1. Click **Customers** tab. A list of your current customers will appear.

Customers

[Export](#) [+ Add user](#)

List					
Name	Email	Address	City/State/Zipcode	Joined	YTD Sales
EMAIL USER	kevin@4eyes.me		, ,	2014-02-11	\$0.00
Gavi Free	gfree@ah.com	1235 Fake Street	Austin, TX, 12345	2014-01-07	\$72.70
Goeff Rams	grams@ah.com	7382 Fake Road	Rooster, TN, 93201	2014-01-07	\$45.71
Jack Patto	jpatto@ah.com	49403 Flight Road	Snow City, MI, 39302	2014-01-07	\$52.39
John Smith	j.smith@email.com	1345 Rolling Hill Road	St. Patrick, MT, 39485	2014-02-04	\$0.00
Michael Jone	mjone@Ah.com	1234 Fake Street	Austin, TX, 12345	2014-01-07	\$67.63
Ray Narz Jr.	rmarz@ah.com	4321 Fake Road	Fake Town, FL, 42312	2014-01-07	\$102.54
Ryan Hiwood	rhiwood@ah.com	123 Fake Street	Small Town, AL, 32425	2014-01-07	\$56.11

2. Click the **Name** of the customer you wish to delete. The Edit User menu will appear.

Edit User

City

Austin

State

Texas

Postal Code

12345

E-mail

gfree@ah.com

Phone

Notes

Delete User

Save Settings

3. Scroll to the bottom of the menu. Click **Delete User**.

4.1.4 Exporting the Customer List

1. Click **Customers** tab. A list of your current customers will appear.

Customers

[Export](#) [+ Add user](#)

List					
Name	Email	Address	City/State/Zipcode	Joined	YTD Sales
EMAIL USER	kevin@4eyes.me		, ,	2014-02-11	\$0.00
Gavi Free	gfree@ah.com	1235 Fake Street	Austin, TX, 12345	2014-01-07	\$72.70
Goeff Rams	grams@ah.com	7382 Fake Road	Rooster, TN, 93201	2014-01-07	\$45.71
Jack Patto	jpatto@ah.com	49403 Flight Road	Snow City, MI, 39302	2014-01-07	\$52.39
John Smith	j.smith@email.com	1345 Rolling Hill Road	St. Patrick, MT, 39485	2014-02-04	\$0.00
Michael Jone	mjone@Ah.com	1234 Fake Street	Austin, TX, 12345	2014-01-07	\$67.63
Ray Narz Jr.	rmarz@ah.com	4321 Fake Road	Fake Town, FL, 42312	2014-01-07	\$102.54
Ryan Hiwood	rhiwood@ah.com	123 Fake Street	Small Town, AL, 32425	2014-01-07	\$56.11

2. Click **Export**. You will be prompted to select where to save the export file.



3. Once you have selected a spot to save the file, click **Save**.

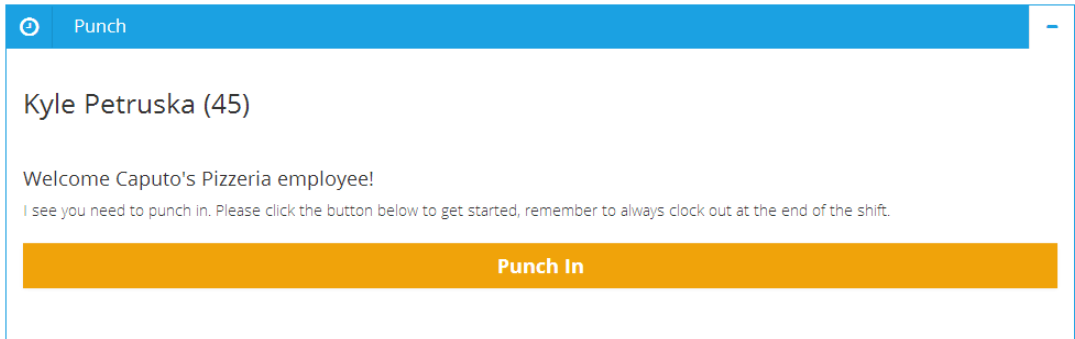
5. Time Management

5.1.1 Clocking In

1. Click the **Clock** tab.



2. If not already clocked in, it should prompt you to clock in. Click **Punch In**.



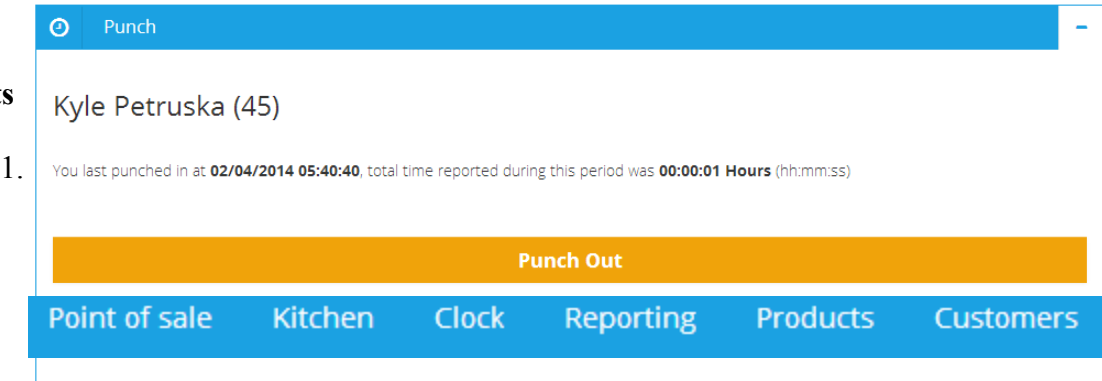
5.1.2 Clocking Out

1. Click the **Clock** tab.



2. If not already clocked out, it should prompt you to clock out. Click **Punch Out**.

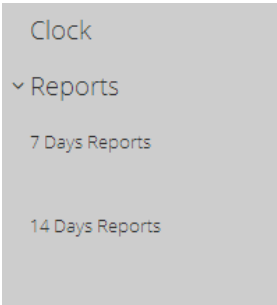
5.1.3 Reports



Time

Click the
Clock
tab.

2. Click **Reports**. A drop down menu should appear.



3. Click either **7 Day Report** or **14 Day Report**. A report of every time you clocked in and how many hours you logged will appear.

Punch			
Id	Name	Date	Hours
149	Kyle Petruska	2014-02-04	2.58
174	Kyle Petruska	2014-02-04	5.28
2			7.86

6. Kitchen

6.1 The Kitchen

Our kitchen module is a very powerful and useful tool for any kitchen, big or small. Using the kitchen not only helps save the environment since it is paperless, it also helps prevent tickets from getting lost. When the orders are sent to the kitchen they will automatically show up in the kitchen once it refreshes.

6.1.1 Accessing the Kitchen

1. Click the **Kitchen** tab. The kitchen module will appear. This will automatically refresh every 80 seconds.



6.1.2 Reading orders

Orders will automatically populate the kitchen module once they are sent to the kitchen. Orders will be newest to oldest. Each order will have the table name at the top, followed by the status, the date and time the order was placed, the type of order, how long the order has been open, and then a list of each item that was ordered along with any allergens they contain.

🛒 (Table 2) +	
Status	PROCESSING
Time	02/04/14 12:43 PM
Type	ORDER
Open	0 MIN
Item/Description	Qty
Water	1
Soft Drink	1
Fresh Lemonade	1
Caputo's Special Gluten	1
Garlic Cheese Bread Dairy Gluten	1
Artichoke Dip Dairy	1

6.1.3 Completing an order

1. Once an order has been completed by the kitchen, click the “+” at the top right corner of the order. A confirmation menu will appear.

Confirmation

Please confirm you wish to mark this order as "complete".

Cancel

Complete

2. Click **Complete**. The kitchen module will then refresh itself and the order will be completed.

7. Order Pad

7.1 The Order Pad

The Order Pad is what your employees will use to place orders into the system and send them to the kitchen. The order pad automatically populates with the categories and products that you have placed into the system and are set as active.

7.1.1 Selecting a Table

1. Click the **Point of Sale** tab. By default, it will bring up the table selection menu.



2. Click the desired table. The order pad will appear with the name of the table next to Details.

OR – IF ALREADY IN THE ORDER PAD

1. Click the light orange **Tables** button near the top right of the screen.



7.1.2 Adding a New Tab

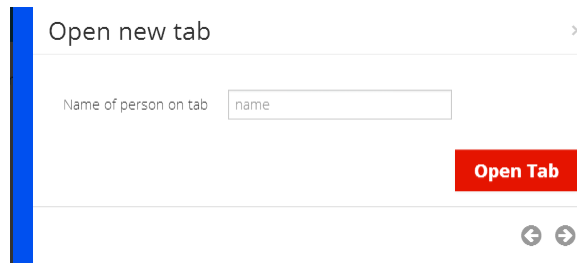
1. Click the light blue **Tabs** button near the top right of the screen. A list of all open tabs will appear.



2. Click **Add New Tab**. The Open new tab menu will appear.



3. Enter the name of the person on tab.



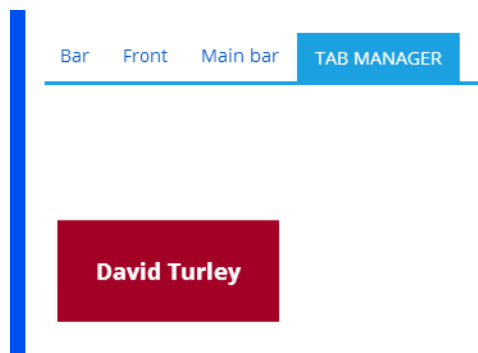
4. Click **Open Tab**.

7.1.3 Selecting a Tab

1. Click the light blue **Tabs** button near the top right of the screen. A list of all open tabs will appear.

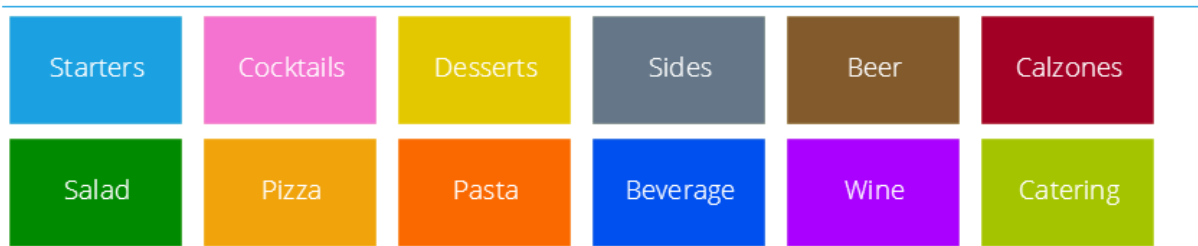


2. Click the Tab you want to select. The order pad will appear with the name of the tab next to Details.



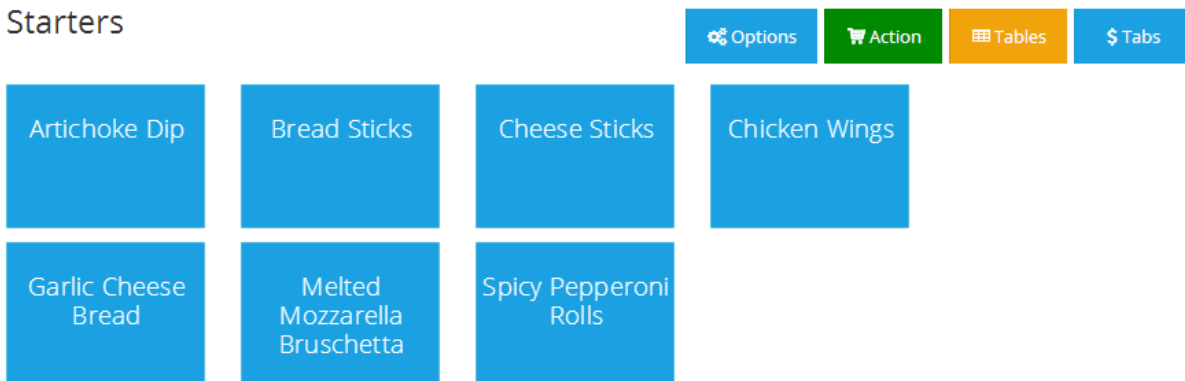
7.1.4 Adding a Product to the Order Pad

1. Once at the order pad, click the **Category** of the product at the bottom right. If you can not find the category you are looking for, try scrolling through the pages. All the products of that category should appear in the box above.



2. Click the **Product** you wish to add to the order pad. If you can not find product you are looking for, try scrolling through the pages.

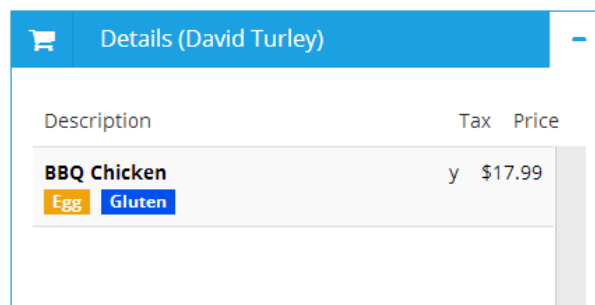
Starters



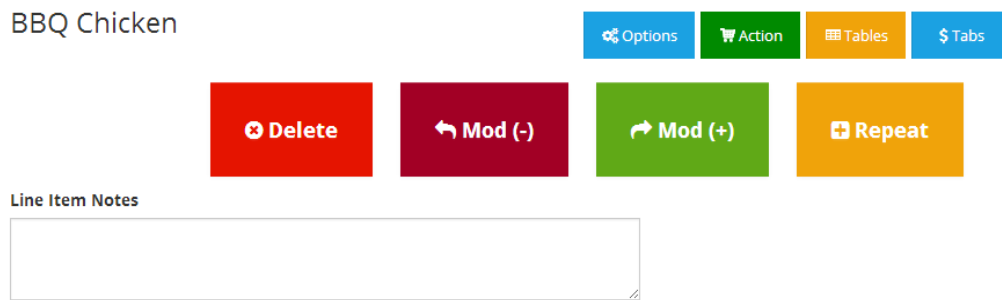
3. **Verify** that the product as been added to the order pad on the left side of the screen.

7.1.5 Deleting a Product from the Order Pad

1. Click the product you wish to delete in the Order Pad.

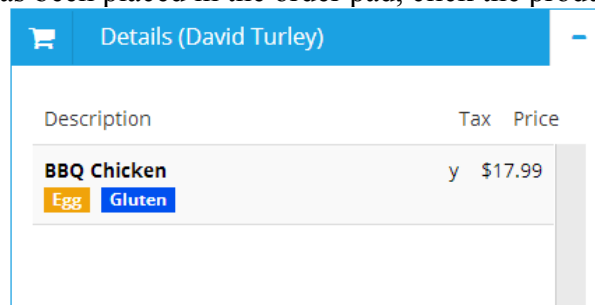


2. Click **Delete**. A confirmation should appear and the product removed from the Order Pad.

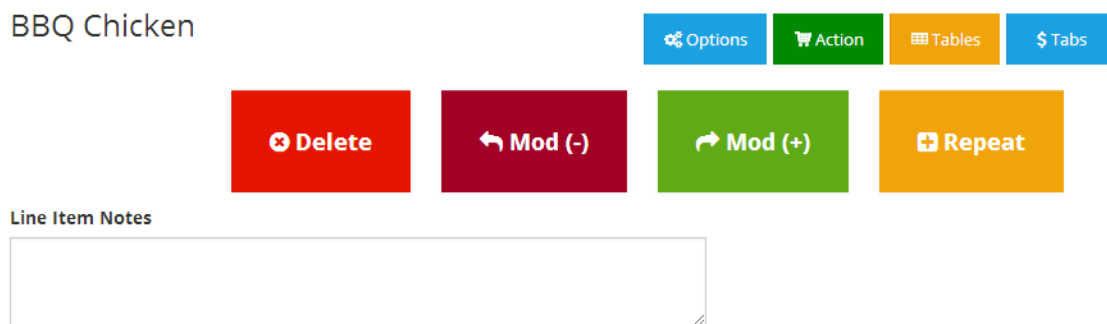


7.1.6 Adding Line Notes to a Product in the Order Pad

1. After the product as been placed in the order pad, click the product you wish to add line notes to.

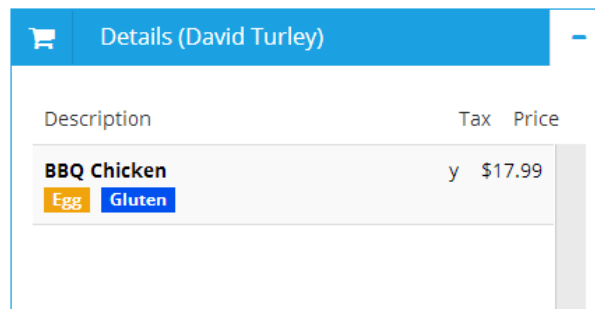


2. In the **Line Item Notes** box type any notes you wish to add. These will be saved automatically.

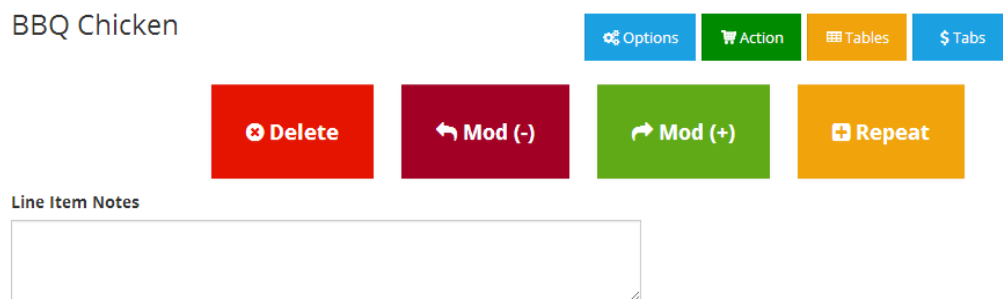


7.1.7 Adding Modifiers to a Product in the Order Pad

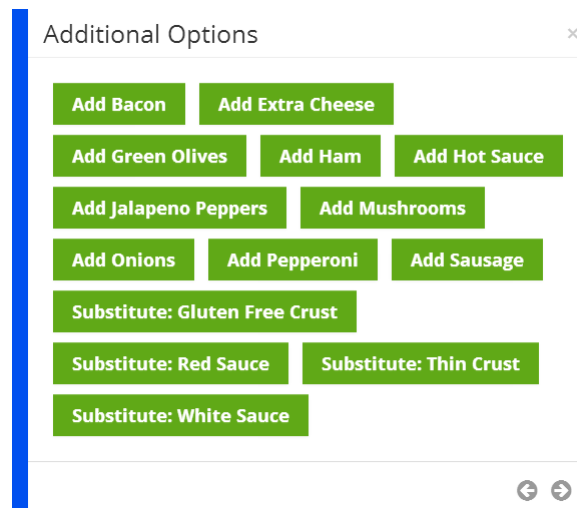
1. After the product as been placed in the order pad, click the product you wish to add a modifier to.



2. Click either **Modifiers (+)** or **Modifiers (-)** depending on if you wish to add or remove something.



3. Click all the modifiers you wish to add.



4. Once done adding, click the black area around the window. Changes will be saved automatically.

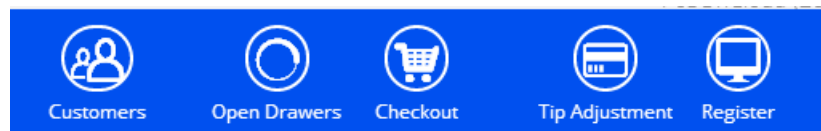
7.2 Options

7.2.1 Opening a Terminal

1. Click the blue **Options** button. A menu will appear at the bottom of the screen.



2. Click **Register**. Register Options will appear on the right side of the screen.



3. Click **Open terminal**. The Open terminal for processing menu will appear.

Register Options



4. Enter the amount of cash that you have placed into the drawer of this register.

5. Click **open terminal**. The open terminal results should appear.

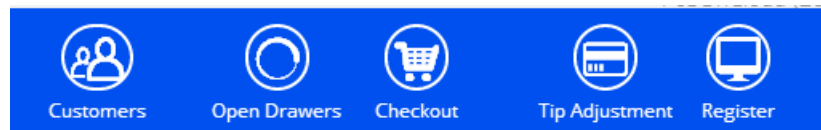
Open terminal results		✕	
Open Time	2014-2-12 12:18:46		
Clerk ID (45)	kylep3		
Clerk Name	Kyle Petruska		
Store	1105		
Opening Cash	\$10.00		
		⏪ ⏩	

7.2.2 Closing a Terminal

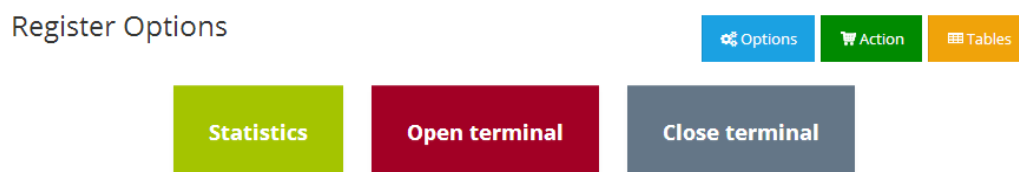
1. Click the blue **Options** button. A menu will appear at the bottom of the screen.



2. Click **Register**. Register Options will appear on the right side of the screen.



3. Click **Close terminal**. The Daily terminal closing menu will appear.



4. Enter the amount of cash you currently have in the drawer of this register.

Daily terminal closing

Please specify the cash in the drawer

close terminal

Open Time	2014-02-12 12:18:46
Clerk ID	kylep3
Clerk Name	Kyle Petruska
Store	1105
Opening Cash	\$10.00
Terminal open	0.01 Hours

5. Click **close terminal**. The close terminal results should appear.

7.2.3 Tip Adjustment

1. Click the blue **Options** button. A menu will appear at the bottom of the screen.



2. Click **Tip Adjustment**. Tip Adjustment menu will appear.



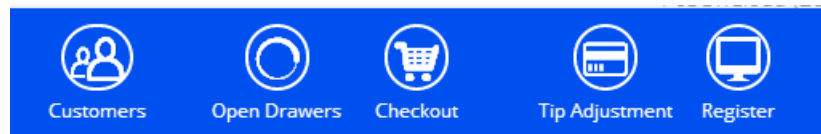
3. Add the tip amount to the box to the right of the order.

7.2.4 Manually Opening the Drawer.

1. Click the blue **Options** button. A menu will appear at the bottom of the screen.



2. Click **Open Drawers**. The drawer will open.

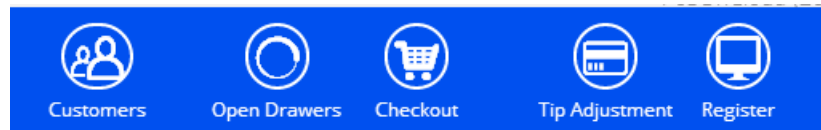


7.2.5 Adding a New Customer From the Order Pad

1. Click the blue **Options** button. A menu will appear at the bottom of the screen.

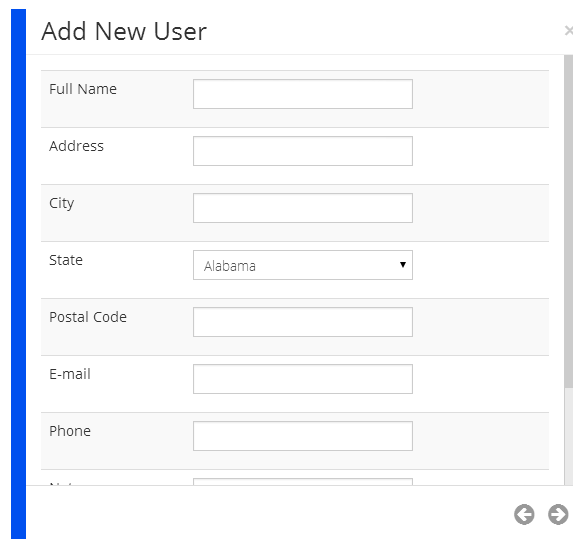


2. Click **Customers**. The Customer Search Options menu will appear.



3. Click **Add User**. The Add New User will appear.

4. Enter all the information into the correct field.

A screenshot of a mobile application window titled "Add New User" with a close button (X) in the top right corner. The form contains several input fields: "Full Name", "Address", "City", "State" (a dropdown menu currently showing "Alabama"), "Postal Code", "E-mail", and "Phone". At the bottom of the form, there are two circular navigation arrows, one pointing left and one pointing right.

5. Click **Save Settings** when you are finished.

7.2.6 Selecting a Customer From the Order Pad

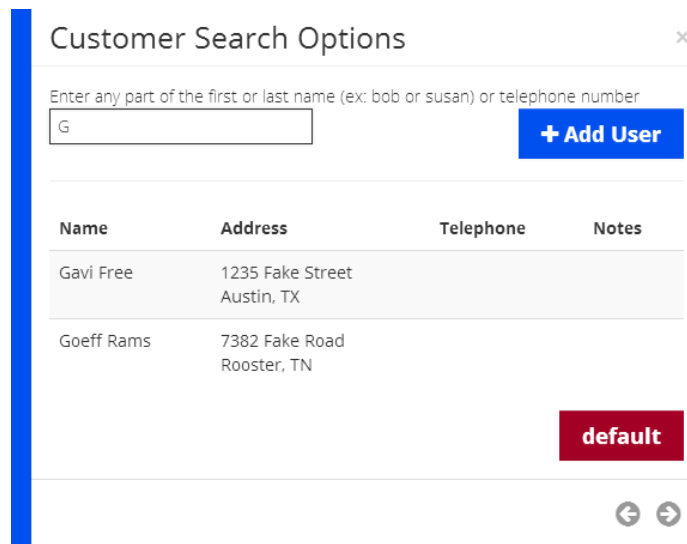
1. Click the blue **Options** button. A menu will appear at the bottom of the screen.



2. Click **Customers**. The Customer Search Options menu will appear.



3. Enter either the customer's name or phone number into the field. Partial names or number can also be searched.
4. Press **Enter**. A list of all matching customers will appear.



Customer Search Options

Enter any part of the first or last name (ex: bob or susan) or telephone number

G

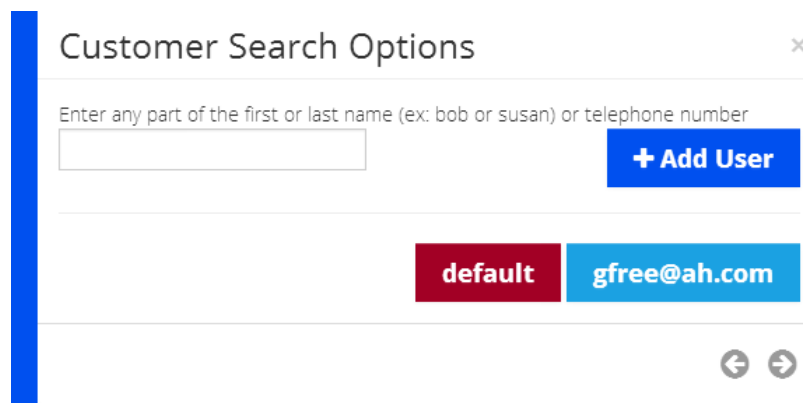
+ Add User

Name	Address	Telephone	Notes
Gavi Free	1235 Fake Street Austin, TX		
Goeff Rams	7382 Fake Road Rooster, TN		

default

← →

5. Select the correct customer. Their e-mail address should appear in a light blue box.



Customer Search Options

Enter any part of the first or last name (ex: bob or susan) or telephone number

+ Add User

default gfree@ah.com

← →

6. Click their **e-mail address**. The order is now set for that customer.

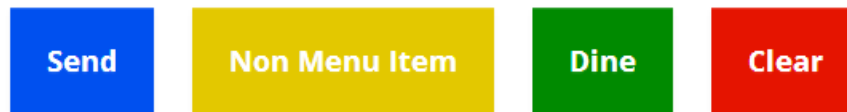
7.3 Actions

7.3.1 Sending an order to the kitchen

1. Once you have added all the products to the order pad, click the green **Actions** button.



2. Click **Send**. Your order is now sent to the kitchen and the table menu will now appear.



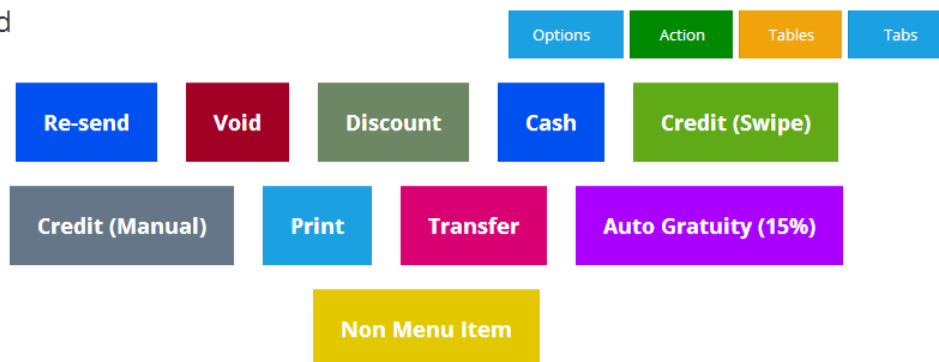
7.3.2 Completing an Order

1. Once your order has been completed by the kitchen, click the green **Actions** button



2. Select the **type of payment**.

Unpaid



IF – CASH

3. The Cash Payment menu will appear. This will show the amount due, amount tendered, and the name of the party.

Cash Payment

Amount Due 19.25

Amount Tendered 0.00

Name of Party (Optional) Name

Predefined amounts received

\$5.00 \$10.00 \$15.00 \$20.00 \$30.00

\$40.00 \$50.00 \$60.00 \$100.00

Complete

4. Either enter the amount tendered into the field manually or by using the predefined amount buttons.
5. Click **complete**. The order summary should appear detailing the order number, payment type, total for the order, amount tenders, and change due.

IF – CREDIT (SWIPE)

3. The Credit Card menu will appear.

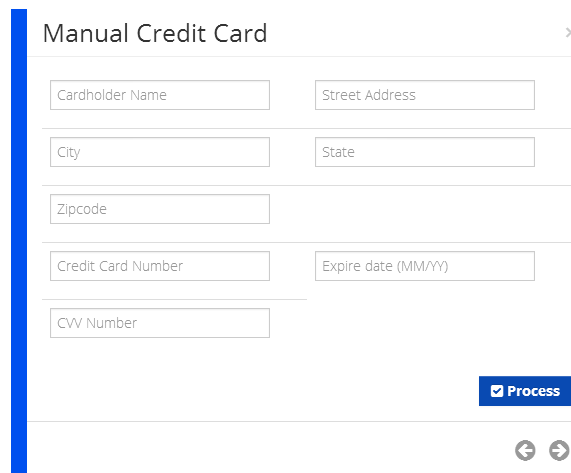
Credit Card

Slide the card through the reader now

4. Swipe the card. All the needed card information should automatically complete. If not, clear the field and swipe again.
5. Click **Authorize**. If accepted, the order summary should appear detailing the order number, payment type, total for the order, amount tenders, and change due.

IF – CREDIT (MANUAL)

3. The Manual Credit Card menu will appear.



A screenshot of a 'Manual Credit Card' form. The form has a title bar with a close button (X). It contains several input fields: 'Cardholder Name', 'Street Address', 'City', 'State', 'Zipcode', 'Credit Card Number', 'Expire date (MM/YY)', and 'CVV Number'. A blue 'Process' button with a checkmark icon is located at the bottom right. Navigation arrows (back and forward) are at the bottom center.

4. Enter all the needed information into the correct fields.

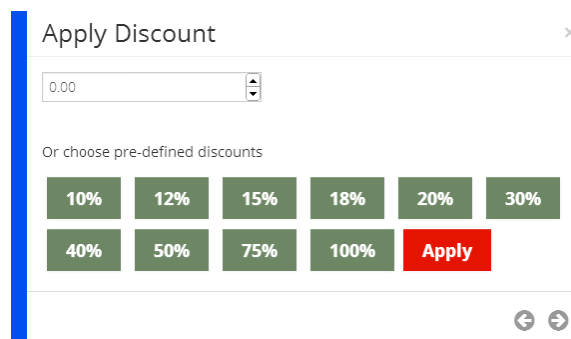
5. Click **Process**. If accepted, the order summary should appear detailing the order number, payment type, total for the order, amount tenders, and change due.

7.3.3 Applying a Discount

1. Once your order has been completed by the kitchen, click the green **Actions** button



2. Click **Discount**. The apply discount menu will appear.



A screenshot of an 'Apply Discount' form. It has a title bar with a close button (X). At the top is a numeric input field showing '0.00'. Below it is the text 'Or choose pre-defined discounts'. There are two rows of buttons: the first row contains '10%', '12%', '15%', '18%', '20%', and '30%'; the second row contains '40%', '50%', '75%', '100%', and a red 'Apply' button. Navigation arrows (back and forward) are at the bottom center.

3. Either input the amount you want to discount or click one of the pre-defined discounts of 10%, 12%, 15%, 18%, 20%, 30%, 40%, 50%, 75%, and 100%.

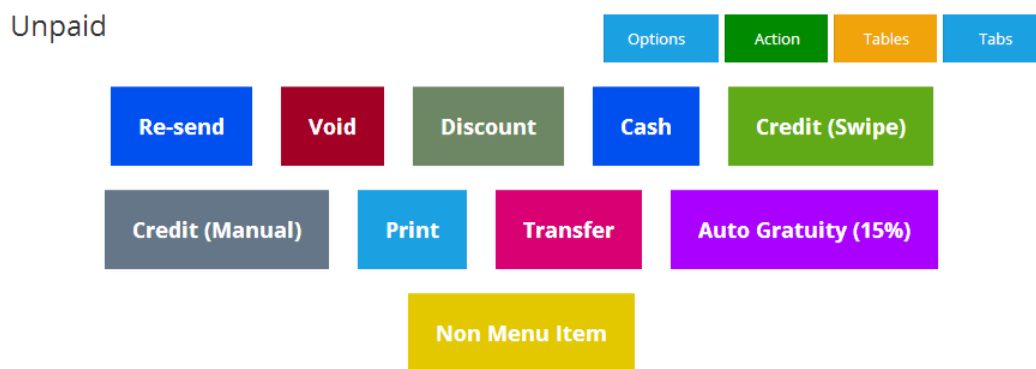
4. Click **Apply**. The amount will be discounted from the order total.

7.3.4 Transferring an Order

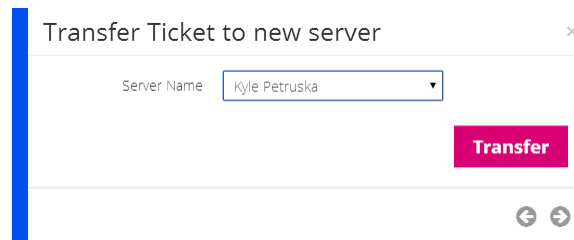
1. Once your order has been completed by the kitchen, click the green **Actions** button



2. Click **Transfer**. The Transfer Ticket to new server menu will appear.



3. Select the server you wish to transfer the order to from the drop down menu.



4. Click **Transfer**.

7.3.5 Auto Gratuity

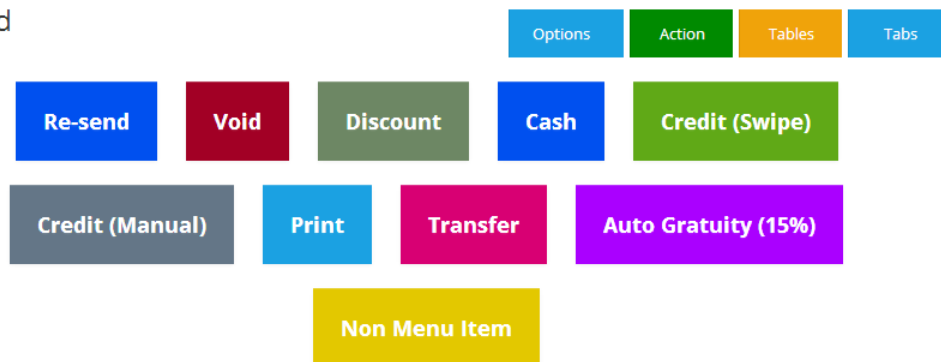
1. Once your order has been completed by the kitchen, click the green **Actions** button



2. Click **Auto Gratuity**. The specified amount of gratuity set up for your business will be added to the

ticket.

Unpaid

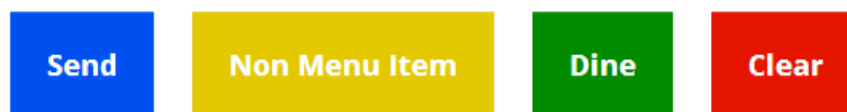


7.3.6 Non-Menu Item

1. Once at the order pad, click the green **Actions** button



2. Click **Non Menu Item**. The non menu item menu will appear.



3. The first field is the cost that the item will be.

 A screenshot of the 'Enter non menu item' dialog box. The dialog has a title bar with a close button (X). Inside, there is a text input field labeled 'Amount of Item (ex: 5.00)' with a dropdown arrow. Below it is a text area labeled 'Description or notes for this item'. At the bottom right, there is a red button labeled 'Apply'. At the bottom center, there are two circular arrows (left and right) for navigation.

4. The second field is the description of the item.

5. Click **Apply**. The item will be added to the order pad with the specified price and description. For this example we simply named it "Non Menu Item."

Details (Table 1)		
Description	Tax	Price
Non Menu Item	y	\$12.00